

# BGSU Schedule of Records Retention

## Office: WBGU-PBS

In accordance with ORC Section 149.33 and Bowling Green State University Board of Trustees, a schedule of Retention and Destruction for the following records is hereby established. The records covered by this schedule, upon expiration of the retention period, shall be destroyed unless otherwise specified. No record shall be destroyed that pertains to any pending claim, action, litigation, or request.

**Approvals:**

Department Official: Signed

Date: 5/31/2010

Records Manager: Signed

Date: 6/11/2010

PLEASE NOTE THAT THIS SCHEDULE APPLIES TO RECORDS IN BOTH PAPER AND/OR ELECTRONIC FORMAT

Schedule Number	Record Series Title	Retention Period
<b>22-1</b>	<b>Accounts Payable/Receivable</b> May include invoices, purchase orders, requisitions, cash register tapes, canceled checks, inter-departmental billing, ledgers, cash and charge receipts	4 years, then destroy
<b>22-2</b>	<b>Annual and Quarterly Reports</b> Annual audit report, CPB annual report, FCC quarterly reports	4 years; transfer CPB reports to Archives
<b>22-3</b>	<b>Budget Planning Documents and Reports</b>	Retain 1 year after budget approved, then destroy
<b>22-4</b>	<b>Correspondence-Executive</b> Pertains to significant aspects of the administration of the office, such as policy, programs, personnel & fiscal issues. Electronic correspondence may be deleted once printed and filed	Retain a minimum of 2 years in office, then transfer to University Archives
<b>22-5</b>	<b>Correspondence-General</b> Includes internal letters and memos; also correspondence from individuals, companies	1 year, then destroy

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	and agencies requesting information pertaining to office and other miscellaneous inquiries. Electronic correspondence may be maintained in an electronic folder or printed out & filed for 1 yr	
<b>22-6</b>	<b>Correspondence-Routine</b> Referral letters, requests for routine information usually answered by form letters, scheduling correspondence, etc. Electronic correspondence may be deleted immediately when designated of no use	Retain until of no administrative value, then destroy
<b>22-7</b>	<b>Departmental Administration Files</b> Correspondence, reports, and materials documenting the activities and concerns of the department. May include building addition files, distance learning files, and other special project files.	3 years; destroy all materials not documenting a significant action or interaction; transfer remainder to Archives
<b>22-8</b>	<b>Donor Files</b> May include pledge forms, copies of checks	Retain while pledge is active or until of no administrative use, then destroy
<b>22-9</b>	<b>Financial Accounting Statement</b> Issued monthly by the Business Office who has original record; provides record of expenses, income, and balances for each account	4 years, then destroy
<b>22-10</b>	<b>Foundation Records</b>	6 years, then destroy
<b>22-11</b>	<b>General Files</b> Correspondence, reports and publications of other departments of BGSU and external agencies	1 year, then destroy
<b>22-12</b>	<b>Grant Proposals, Approved</b>	5 years after project ends; review for historical value, then destroy or transfer to Archives unless the grantor requires longer retention or if there is a lien on part of the grant.
<b>22-13</b>	<b>Grant Proposals, Rejected</b>	1 year, then destroy
<b>22-14</b>	<b>News clippings</b> Concerning the activities of WBGU	3 years; transfer to Archives
<b>22-15</b>	<b>Personnel Records</b>	Destroy upon termination, resignation, or retirement; Human Resources maintains original record

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<b>22-16</b>	<b>Procurement Card Purchase Information</b> May include receipts and reconciliation documentation	Keep all scanned documentation 15 months; Keep all documentation not scanned 4 years; destroy electronic files after 4 years
<b>22-17</b>	<b>Production Files, Documentaries</b> For one-time productions, such as <i>Days of the One Room Schoolhouse</i> . May include articles, notes, location information, interviews, contacts, proposals, budgets, photographs, clearances/releases final scripts, transcripts and electronic files which directly document the production process.	Once production is complete, files should be appraised (weeded) by producer/director for duplicate and extraneous information. Files should be kept permanently and transferred to Archives after no longer of administrative use.
<b>22-18</b>	<b>Production Files, Local Series</b> May include the same documents as found in the one-time production files, but for series productions, such as <i>NW Ohio Journal</i> .	Maintain as complete as possible file(s) illustrating the establishment of the production. For the continuing series, maintain only such papers which document each episode's topic(s), on-air talent, changes made to original format, etc. Files should be kept permanently and transferred to the Archives once series is ended, or at periodic times during on-going series.
<b>22-19</b>	<b>Promotional Materials</b> Records created to promote WBGU-PBS, its programs, and activities. May include newsletters, brochures, photographs, press releases, graphics.	Retain until of no administrative use, then transfer two to Archives
<b>22-20</b>	<b>Program Clearance/Rights Records</b>	Active + 4 years
<b>22-21</b>	<b>Program Logs</b>	Retain until of no administrative use, then transfer to Archives
<b>22-22</b>	<b>Program Purchase Records</b>	Active + 4 years
<b>22-23</b>	<b>Public Advisory Council for Television Files</b> Agendas, minutes, correspondence, reports	5 years; transfer to Archives
<b>22-24</b>	<b>Search Committee files</b> Job posting, list of candidates, final report	Retain 1 year after hiring date, then destroy. Human Resources maintains original hiring information and Office of Equity and Diversity maintains original search committee documents.
<b>22-25</b>	<b>Scholarship and Award Files</b>	Active + 6 years

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<b>22-26</b>	<b>Software Rights Records</b>	Keep as long as administratively necessary, then destroy
<b>22-27</b>	<b>Student Employee Files</b>	Retain 2 years after last activity; purge for reference; destroy in a confidential manner (official file kept by Student Employment)
<b>22-28</b>	<b>Time Cards and Sheets (copies)</b> Includes Non-Student Letter of Appointment time sheets	5 years, then destroy
<b>22-29</b>	<b>Travel Reimbursement Forms</b> For University-related travel	4 years, then destroy
<b>22-30</b>	<b>Video Recordings of Locally Produced Programs</b>	Maintain one copy of each on best format for permanent preservation and transfer to Archives. Scenes and interviews not used in final production should be appraised for local history content. Those sections deemed of permanent value should be transferred onto best format for permanent preservation and transferred to the Archives. Other video may be either re-used or destroyed.
<b>22-31</b>	<b>Video Recordings, Other Films/Videos</b>	Keep one copy and transfer onto best format for permanent preservation all shows which document BGSU and the viewing area (Northwest Ohio). These may include promotional videos for BGSU departments, area businesses, and corporations, graduations, festival breaks, celebrity visits, etc. These films and videos should be used to visually document WBGU-PBS's history, that of BGSU, and the NW Ohio community.
<b>22-32</b>	<b>Workshop &amp; Special Event Files</b> For workshops, conferences and events hosted by WBGU-PBS	3 years; destroy menus, invoices, receipts; transfer remainder to Archives